

**U.S. SERVICE SUPPLIER QUESTIONNAIRE**  
**LOGISTIC SERVICES: AN OVERVIEW OF THE GLOBAL MARKET AND POTENTIAL**  
**EFFECTS OF REMOVING TRADE IMPEDIMENTS**

*Return completed questionnaire to:*

**UNITED STATES INTERNATIONAL TRADE COMMISSION**  
Office of Industries, Room 500-C  
500 E Street SW, Washington, DC 20436

**So as to be received by the Commission by no later than December 17, 2004**

The information called for in this questionnaire is for use by the United States International Trade Commission in connection with investigation No. 332-463 (Logistic Services: An Overview of the Global Market and Potential Effects of Removing Trade Impediments) under section 332(g) of the Tariff Act of 1930 (19 U.S.C. 1332(g)). The information in the questionnaire is needed to supplement data available to the Commission from other sources and is requested under the authority of section 332 of the Tariff Act of 1930. This report is mandatory and failure to reply as directed can result in a subpoena or other order to compel the submission of records or information in your possession (19 U.S.C. § 1333(a)).

**Name of firm**

**Address** \_\_\_\_\_

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip code** \_\_\_\_\_

**World Wide Web address** \_\_\_\_\_

Does your firm provide third-party logistic services or perform logistics-related activity to facilitate the movement of unfinished, semi-finished, or finished goods throughout a global supply chain? These activities may include freight transportation, cargo handling, storage and warehousing, freight transport agency services (freight forwarding), express delivery, consulting, and/or customs processing services.

☐ **NO** (Sign the certification below and promptly return only this page of the questionnaire to the Commission)

☐ **YES** (Read the instructions carefully, complete all parts of the questionnaire, sign the certification, and return the entire questionnaire to the Commission)

**CERTIFICATION**

*The undersigned certifies that the information herein supplied in response to this questionnaire is complete and correct to the best of his/her knowledge and belief and understands that the information submitted is subject to audit and verification by the Commission. Section 332(g) provides that the Commission may not release information which the Commission considers to be confidential business information, unless the party submitting the confidential business information had notice, at the time of submission, that such information would be released by the Commission, or such party subsequently consents to the release of the information. The U.S. Trade Representative has requested that the Commission provide a non-confidential (public) report.*

*The undersigned acknowledges that information submitted in this questionnaire response and throughout this investigation may be used by the Commission, its employees, and contract personnel who are acting in the capacity of Commission employees, for developing or maintaining the records of this investigation or related proceedings for which this information is submitted, or in internal audits and investigations relating to the programs and operations of the Commission pursuant to 5 U.S.C. Appendix 3. I understand that all contract personnel will sign non-disclosure agreements.*

\_\_\_\_\_  
*Name and Title of Authorized Official*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*e-mail address*

\_\_\_\_\_  
*Signature of Authorized Official*

( )  
\_\_\_\_\_  
*Phone*

( )  
\_\_\_\_\_  
*Fax*

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**GENERAL INFORMATION, INSTRUCTIONS, AND DEFINITIONS**

**BACKGROUND.**—The information requested in this questionnaire is for use by the Commission in its investigation on *Logistic Services: An Overview of the Global Market and Potential Effects of Removing Trade Impediments*, requested by the Office of the United States Trade Representative (USTR) in support of trade negotiations. As requested by the USTR, the report will focus on foreign markets for logistic services and will (1) provide an overview of the global logistic services market, including major industry players, factors driving growth, and industry operations; (2) examine trade and investment in selected regional logistic service markets, including impediments to the provision of international logistic services, if any; and (3) discuss and, to the extent feasible, analyze the potential effects of removing impediments to logistic services on trade and economic welfare.

**DUE DATE OF QUESTIONNAIRE.** Return the completed questionnaire to the Commission by no later than **December 17, 2004**. Use of an overnight mail service may be necessary to ensure that your response actually reaches the Commission by this due date.

Additional questionnaires will be supplied promptly upon request (see Further Information section below for contact information), or photocopies of the enclosed questionnaires may be used. Copies of the questionnaire are also available on the Commission's web site (<http://www.usitc.gov>).

**NONDISCLOSURE OF CONFIDENTIAL BUSINESS INFORMATION.** Commercial and financial data furnished in response to the enclosed questionnaire that reveal the individual operations of your firm will be treated as confidential business information by the Commission to the extent that such data are not otherwise available to the public and will not be published in a manner that will reveal the individual operations of your firm and will not be disclosed except as may be required by law. Such confidential information will not be published in a manner that will reveal the individual operations of your firm; however, nonnumeric characterizations of confidential business information that you furnish (such as discussion of trends) will be treated as confidential business information only at the request of the submitter for good cause shown. Section 332(g) provides that the Commission may not release information which the Commission considers to be confidential business information (see definition in Commission Rule 201.6 (19 CFR 201.6)) unless the party submitting the confidential business information had notice, at the time of submission, that such information would be released by the Commission, or such party subsequently consents to the release of the information. The USTR has requested that the Commission provide a non-confidential (public) report.

In addition, by signing the certification on the cover page of the enclosed questionnaire, the signing official authorizes that information submitted in the questionnaire response and throughout this investigation may be used by the Commission, its employees, and contract personnel who are acting in the capacity of Commission employees, for developing or maintaining the records of this investigation or related proceedings for which this information is submitted, or in internal audits and in investigations relating to the programs and operations of the Commission pursuant to 5 U.S.C. Appendix 3. All contact personnel will sign non-disclosure agreements.

**VERIFICATION.** The information submitted in the enclosed questionnaire is subject to audit and verification by the Commission. To facilitate verification of data, please keep all your work papers and supporting documents used in the preparation of the questionnaire response(s).

**FURTHER INFORMATION.**—If you have any questions concerning this questionnaire or other matters related to this investigation, please contact Michael Nunes (202/205-3462, [michael.nunes@usitc.gov](mailto:michael.nunes@usitc.gov)) or Amanda Horan (202/205-3459, [amanda.horan@usitc.gov](mailto:amanda.horan@usitc.gov)). Address all correspondence to:

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Office of Industries, Room 500-C  
500 E Street SW.  
Washington, DC 20436  
fax: 202/205-2359

**INFORMATION FOR THE HEARING IMPAIRED.** Hearing-impaired individuals can obtain information regarding this investigation via TDD terminal (202/205-1810).

**GENERAL INSTRUCTIONS**

1. Please note that the following questions should be answered for all countries in which your firm maintains operations, selected from the list below. Please photocopy the blank survey template as many times as needed to ensure the questions are answered for all relevant countries. To facilitate the response process, firms may choose to distribute the questions to field representatives in the subject country(ies). For your convenience, we have developed the questionnaire in multiple software applications, including Microsoft Excel and Microsoft Access. Paper copies of completed questionnaires may be mailed to the address above. If you choose to answer this survey electronically, you may download the survey in Microsoft Access or Excel from the Commission's website (<http://www.usitc.gov/332s.htm>). Electronic copies of completed questionnaires may be saved on diskette or CD ROM and mailed to the address above or e-mailed to Michael Nunes ([michael.nunes@usitc.gov](mailto:michael.nunes@usitc.gov)). If you choose to complete the survey electronically, the signed Certification sheet must accompany the submission.
2. The survey contains four parts. Please answer the questions in each part to the best of your ability. If you are not sure how to respond to a question, please mark "Not Sure." Questions in parts II, III, and IV refer to U.S. export cargo arriving in the country in question, unless otherwise specified. If there are multiple points of entry in the importing country, the response should refer to the typical or average experience. If there are significant differences between points of entry, please note these in the Comments section.
3. Please use the corresponding worksheet for each country. As noted above, one questionnaire should be filled out for each country in which you maintain operations (as listed below). If you operate in a country not listed, please do not fill out the survey for that country.

Argentina, Australia, Belgium, Bolivia, Brazil, Bulgaria, Canada, Chile, China, Colombia, Costa Rica, Czech Republic, Denmark, Ecuador, Egypt, El Salvador, Finland, France, Germany, Greece, Hong Kong, Hungary, Iceland, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mauritius, Mexico, Netherlands, New Zealand, Peru, Philippines, Poland, Portugal, Russia, Singapore, Slovakia, South Africa, South Korea, Spain, Sweden, Taiwan, Thailand, Turkey, Ukraine, United Kingdom, Venezuela, Vietnam, and Zimbabwe.

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**PLEASE REPORT THE FOLLOWING INFORMATION AND DATA**

Please indicate the country to which your responses apply. As noted above, one questionnaire should be filled out for each country in which you maintain operations, chosen from the list in Attachment A. If you operate in a country not listed in Attachment A, please do not fill out the survey for that country.

COUNTRY: \_\_\_\_\_

Please indicate the category (ies) that describe your organization and/or what it provides (check all that apply):

- |  |  |
|--|--|
| <input type="checkbox"/> Third-party logistics             | <input type="checkbox"/> Ground freight forwarding       |
| <input type="checkbox"/> Private terminal operator         | <input type="checkbox"/> Logistics consulting            |
| <input type="checkbox"/> Internal shipping/logistics dept. | <input type="checkbox"/> Customs processing/brokerage    |
| <input type="checkbox"/> Air freight transportation        | <input type="checkbox"/> Storage and Warehousing         |
| <input type="checkbox"/> Air Freight forwarding            | <input type="checkbox"/> Maritime freight forwarding     |
| <input type="checkbox"/> Express Delivery                  | <input type="checkbox"/> Maritime freight transportation |
| <input type="checkbox"/> Cargo handling                    | <input type="checkbox"/> Other (specify): _____          |
| <input type="checkbox"/> Ground freight transportation     |  |

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**SECTION I*****Regulatory/policy related questions***

I-1 In this country, are foreign logistics providers permitted to own and operate ground transportation fleets and equipment?

☐ YES ☐ NO

I-1A If you answered "NO" to question I-1, how does this impact your operations in this country? (Check all that apply).

☐ Increases costs ☐ Decreases costs  
☐ Decreases service reliability ☐ Impedes ability to offer end-to-end services  
☐ Limits scope of services ☐ Little or no impact  
☐ Other, please specify:

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I-2 In this country, is your firm required to hire local residents in certain positions.

☐ YES ☐ NO

I-2A If you answered "YES" to question I-2, on a scale of 1 to 5, where 1 = a significant increase and 5 = a significant decrease, please rate the effect of this requirement on costs.

1      2      3      4      5      Not Sure

I-2B If you answered "YES" to question I-2, on a scale of 1 to 5, where 1 = a significant increase and 5 = significant decrease, please rate the effect of this requirement on productivity.

1      2      3      4      5      Not Sure

I-3 For this country, please rate on a scale of 1 to 5 the impact of establishment restrictions, such as joint venture requirements, ownership/equity restrictions, or investment limitations, on your operations (1 = significantly impedes ability to operate; 5 = little or no impact).

1      2      3      4      5      Not Sure

I-3A For this country, on a scale of 1 to 5, please rate the effect of establishment restrictions, such as joint venture requirements; ownership/equity restrictions; or investment limitations on competition with domestic firms. (1 = gives domestic firm a significant advantage; 5 = little or no impact).

1      2      3      4      5      Not Sure

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I-4 For this country, are licensing procedures transparent (i.e., Are licensing requirements widely published? Are you given advanced notification of changes in licensing procedures? Is there opportunity for comment on requirements and proposed changes in procedures?)

☐ YES ☐ NO

I-4A If you answered "NO" to question I-4, please describe the impact of licensing procedures on your operations in this country. (Check all that apply)

☐ Increases costs ☐ Prevents establishment  
☐ Limits scope of services ☐ Little or no impact  
☐ Decreases costs  
☐ Other, please specify:

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I-4B In this country, do domestic firms have an easier time obtaining licenses than foreign-owned firms?

☐ YES ☐ NO

I-5 For this country, does your firm have difficulty obtaining entry visas and work permits?

☐ YES ☐ NO

I-5A If you answered "YES" to question I-5, please rate the impact of visa and work permit requirements on your operations (1= significant adverse effect; 5 = little or no effect).

1      2      3      4      5      Not Sure

I-6 In this country, are regulations that affect logistic services transparent? (i.e., Are regulations widely published? Are you given advanced notification of regulatory changes? Is there opportunity for comment on regulations and proposed changes?).

☐ YES ☐ NO

I-6A If you answered "NO" to question I-6, please rate the effect of regulatory nontransparency on your operations in this country. (1 = significant adverse effect; 5 = little or no effect).

1      2      3      4      5      Not Sure

I-7 In this country, do domestic competitors have access to information affecting regulations before you do?

☐ YES ☐ NO

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I-7A If you answered "YES" to question I-7, please rate the effect of this on competition. (1 = significant adverse effect; 5 = little or no effect).

I-8 In the space provided below, please describe any regulations/policies that impede your operations in this country:

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins or other markings on the paper.

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**SECTION II*****Modal-specific questions for airports: (for all respondents except water transporters)***

- II-1 Please estimate in hours the average time it takes to process cargo, from the time of aircraft landing to the time nationalized cargo passes through the gate and can be claimed by a consignee.

Number of Hours: \_\_\_\_\_.

- II-1A Please rate the following cargo procedures in terms of speed (1 = very fast; 5 = slow)

Procedure	Speed
Loading and unloading trucks	1 2 3 4 5
Palletizing cargo	1 2 3 4 5
Activities of inspection authorities (e.g. national security and drug enforcement)	1 2 3 4 5
Transporting cargo between terminals and customs areas	1 2 3 4 5
Warehousing	1 2 3 4 5
Clearance of customs	1 2 3 4 5
Exit gate procedures	1 2 3 4 5

- II-1B Of the cargo procedures listed in question II-1A, please indicate which procedures are the most time consuming:

\_\_\_\_\_.

- II-2 On a scale of 1 to 5, please indicate the degree to which you disagree/agree with the following statement (1 = Strongly Disagree; 5 = Strongly Agree):

In this country, the cost of auxiliary services (e.g. loading and unloading trucks, palletizing cargo, transporting cargo between terminals and customs areas, warehousing) is low.

1      2      3      4      5      Not Sure      Does not apply



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II-2A Please rate the following auxiliary services in terms of cost (1 = very costly; 5 = not costly):

Procedure	Costs
Loading and unloading trucks	1 2 3 4 5
Palletizing cargo	1 2 3 4 5
Activities of inspection authorities (e.g. national security and drug enforcement)	1 2 3 4 5
Transporting cargo between terminals and customs areas	1 2 3 4 5
Warehousing	1 2 3 4 5
Clearance of customs	1 2 3 4 5
Exit gate procedures	1 2 3 4 5

### SECTION III

*Modal-specific questions for seaports: (for all respondents except air transporters)*

III-1 Please estimate in hours the average time it takes to process cargo, from the time of harbor entry to the time nationalized cargo passes through the port gate and can be claimed by a consignee.

Number of Hours: \_\_\_\_\_.

III-1A Please rate the following maritime cargo procedures in terms of speed. (1=very fast; 5 = slow):

Procedure	Speed
The berthing and navigation process on port entry	1 2 3 4 5
Activities of inspection authorities (e.g. national security and drug enforcement)	1 2 3 4 5
Unloading cargo onto the apron, and inspecting the seal	1 2 3 4 5
Container dispatch to and from storage within the yard	1 2 3 4 5
Clearance of customs	1 2 3 4 5
Exit gate procedures, including weighing containers, paperwork, security checks, and fumigation, if necessary	1 2 3 4 5

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III-1B Of the maritime cargo procedures listed in question III-1A, please indicate which procedures are the most time consuming:

\_\_\_\_\_.

III-2 On a scale of 1 to 5, please indicate the degree to which you disagree/agree with the following statement (1 = Strongly Disagree; 5 = Strongly Agree):

The overall cost of auxiliary services (e.g. berthing and navigation, unloading cargo, container dispatch to and from storage within the yard, gate procedures) is relatively low

1       2       3       4       5       Not Sure       Does not apply

III-2A Please rate the cost of the following maritime cargo procedures (1= Very costly; 5 = Not very costly):

Procedure	Cost
Charges upon entry into port (e.g. navigation or port dues, pilotage, tug assist, and line handling)	1 2 3 4 5
Berthage or "parking" charges	1 2 3 4 5
Charges for crane use (including "wharfage" charges when the ship's own crane is used), and charges for inspecting the seal	1 2 3 4 5
Dispatch fees for moving containers to and from the yard	1 2 3 4 5
Storage fees	1 2 3 4 5
Charges for gate procedures, including "traffic" taxes on trucks entering the gate for pickup, scale charges and charges for security checks and (if necessary) fumigation.	1 2 3 4 5

III-3 Are the ports in this country (Please check all that apply)

☐ Landlord ports? (Publicly owned infrastructure, privately owned superstructure and operating assets)

Please estimate the percentage of Landlord ports in this country: \_\_\_\_\_%

☐ Tool ports? (Publicly owned infrastructure and superstructure with assets rented to private firms)

Please estimate the percentage of Tool ports in this country: \_\_\_\_\_%

☐ Service ports? (Publicly owned and operated)

Please estimate the percentage of Service ports in this country: \_\_\_\_\_%

☐ Privately-owned ports?

Please estimate the percentage of privately-owned ports in this country: \_\_\_\_\_%

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III-3A Please indicate which port ownership structure described in question III-3 is preferred: \_\_\_\_\_.

III-4 On a scale of 1 to 5, please indicate the degree to which you disagree/agree with the following statement (1 = Strongly Disagree; 5 = Strongly Agree):

Costs of repositioning equipment within-country are relatively low.

1      2      3      4      5      Not Sure      Does not apply

**SECTION IV**

*Non-modal-specific questions: (for all respondents)*

For the following, on a scale of 1 to 5, please indicate the degree to which you disagree/agree with the following statement (1 = Strongly Disagree; 5 = Strongly Agree):

IV-1 Compared with provisions in recent U.S. Free Trade Agreements (FTA) that require release of goods from customs within 48 hours of arrival, customs clearance time in this country is relatively fast.

1      2      3      4      5      Not Sure      Does not apply

IV-2 In your experience, costs related to customs procedures are low relative to other countries.

1      2      3      4      5      Not Sure      Does not apply

IV-3 Transparency of customs procedures is high relative to other countries (e.g. There is little corruption in customs processing; regulation notices are published in advance and there are opportunities for comment).

1      2      3      4      5      Not Sure      Does not apply

IV-4 Relative to other countries, Time involved in government regulatory and inspection procedures is low (e.g. national security, drug enforcement, product standards, sanitary and phytosanitary standards).

1      2      3      4      5      Not Sure      Does not apply

IV-5 Relative to other countries costs related to government regulatory and inspection procedures are low (e.g. national security, drug enforcement, product standards, sanitary and phytosanitary standards (SPS)).

1      2      3      4      5      Not Sure      Does not apply

IV-6 Relative to other countries, transparency of government regulatory and inspection procedures is high (e.g. there is little corruption in government regulation and inspections; regulation notices are published in advance and there are opportunities for comment).

1      2      3      4      5      Not Sure      Does not apply

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- IV-7 In this country, inland road transport connecting to the transport modes we use is readily available, and of high quality.
- 1      2      3      4      5      Not Sure      Does not apply
- IV-8 In this country, inland rail transport connecting to the transport modes we use is readily available, and of high quality.
- 1      2      3      4      5      Not Sure      Does not apply
- IV-9 In this country, financial products and other infrastructure necessary to facilitate trade (e.g. banking, insurance, and telecommunications) are generally available at competitive prices.
- 1      2      3      4      5      Not Sure      Does not apply
- IV-10 In this country, there are adequate facilities in or near ports of entry for transfer of cargo from one mode to another (e.g. from air or sea containers to trucks and rail cars).
- 1      2      3      4      5      Not Sure      Does not apply
- IV-11 In this country, qualified and experienced labor for logistics activities is readily available.
- 1      2      3      4      5      Not Sure      Does not apply
- IV-12 In this country, security procedures are effective in minimizing losses from theft.
- 1      2      3      4      5      Not Sure      Does not apply
- IV-13 In this country, security procedures are *not* unduly burdensome relative to the objectives they are designed to achieve.
- 1      2      3      4      5      Not Sure      Does not apply
- IV-14 In this country, the frequency of customs inspections is predictable and reasonable.
- 1      2      3      4      5      Not Sure      Does not apply
- IV-15 Specifically, which of the following government regulatory and inspection procedures impose a significant burden in the country in question? (Check all that apply)
- ☐ National security/border security
- ☐ Drug enforcement
- ☐ Product standards/conformity procedures
- ☐ Sanitary and phytosanitary standards (SPS)
- ☐ Other (please specify) \_\_\_\_\_
- IV-16 U.S. exports receive different treatment in ports and airports relative to exports from other countries. (1 = U.S. exports are treated significantly unfavorably; 3 = U.S. exports and other exports are treated equally; 5 = U.S. exports are treated significantly favorably)
- 1      2      3      4      5      Not Sure      Does not apply

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IV-16B If your response to IV-16 was 1, 2, 4, or 5, please indicate briefly the nature of the differing treatment:

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IV-17 Please estimate the percent that customs processing adds to your overall import costs in this country: \_\_\_\_\_%

IV-18 Please estimate the percent that regulatory and inspection procedures add to your overall import costs in this country: \_\_\_\_\_%

IV-19 Please estimate the percent that other (specify) procedures add to your overall import costs in this country:

Procedure: \_\_\_\_\_ . Percent of costs \_\_\_\_\_%

Procedure: \_\_\_\_\_ . Percent of costs \_\_\_\_\_%

Procedure: \_\_\_\_\_ . Percent of costs \_\_\_\_\_%

Procedure: \_\_\_\_\_ . Percent of costs \_\_\_\_\_%

Procedure: \_\_\_\_\_ . Percent of costs \_\_\_\_\_%

Procedure: \_\_\_\_\_ . Percent of costs \_\_\_\_\_%

Space for comments (Please attach additional pages as necessary)

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